

Date 06/29/12

**Environmental Management Consolidated Business Center (EMCBC)****Subject: Formation, Identification and Management of an Integrated Project Team (IPT)/Acquisition Integrated Project Team (AIPT)/Source Evaluation Board (SEB) at the EMCBC**

Implementing Procedure

APPROVED: (Signature on File)

EMCBC Director

ISSUED BY: Office of Contracting

GENERAL REVISION**1.0 PURPOSE**

The purpose of this procedure is to identify the process for the formation, identification and management of an Integrated Project Team (IPT)/ Acquisition Integrated Project Team (AIPT)/Source Evaluation Board (SEB) at the Environmental Management Consolidated Business Center's (EMCBC) Chiquita Center (Cincinnati, Ohio), Springdale (Boggs Lane, Springdale, Ohio), and other satellite locations.

2.0 SCOPE

The scope of this procedure is to establish a systemic approach for forming, identifying and managing an IPT/AIPT/ SEB and provide information on day to day operations of an AIPT/SEB.

3.0 APPLICABILITY

All EMCBC staff shall comply with this procedure.

4.0 REQUIREMENTS and REFERENCES

4.1 Requirements: Not Applicable

4.2 References:

4.2.1 HCA Directive 1.3, EM Acquisition Center Concept of Operations

4.2.2 IP-240-01, Cyber Security – Account Management and User Responsibilities

4.2.3 IP-243-03, Identifying, Filing, and Maintaining Records

4.2.4 DOE Order 413.3B, Program and Project Management for the Acquisition of Capital Assets

4.2.5 IP-470-01, EMCBC Visitor Access Procedure

4.2.6 PL-472-01, EMCBC Occupant Emergency Plan

4.2.7 IP-540-02, Rev 2, EMCBC Receipt and Handling of Offerors' Proposals

5.0 DEFINITIONS

- 5.1 Acquisition Integrated Project Team (AIPT) – a team formed for acquisition purposes that starts at the time the team is established and runs through the release of a solicitation. AIPT membership will ideally be, but is not required to be, the same as SEB membership.
- 5.2 AIPT/SEB Planning Worksheet – a worksheet listing the pertinent information of a planned acquisition [e.g., scope, description, estimated value, expiration date of current contract, milestone dates, staffing resources (AIPT/SEB members), budget and funding resources, etc.]. Both a preliminary and final AIPT/SEB Worksheets shall be completed for each AIPT and revised for each corresponding SEB.
- 5.3 AIPT/SEB Resource Management System – the system in EMCBC Services (i.e., EMCBC Intranet) that tracks resources assigned to AIPT/SEBs.
- 5.4 Integrated Project Team (IPT) – an internal EMCBC team formed for other than acquisition purposes; a cross-functional group of individuals organized for the specific purpose of delivering a project or product to an external or internal customer.
- 5.5 IPT Planning Worksheet – a worksheet listing the pertinent information of an internal EMCBC planned project team effort [e.g., scope, description, milestone dates, staffing resources (IPT members), budget and funding resources, etc.].
- 5.6 Non-EMCBC IPT/AIPT/SEB Member – an individual who is not employed by the EMCBC.
- 5.7 Source Evaluation Board (SEB) – a team formed for acquisition purposes that starts at the time a solicitation is released and runs through the award of the contract, including any debriefings and protest activities, if applicable. Typically, SEB core members are the SEB Chair and other voting members, the Contracting Officer (CO) and the Contract/Acquisition Specialist.
- 5.8 EMCBC Senior Management – the EMCBC Director, Deputy Director, and Assistant Director's for the following EMCBC Offices: Office of Civil rights and Diversity (OCD); Office of Contracting (OOC); Office of Cost Estimating and Project Management Support (OCEPMS); Office of Financial Management (OFM); Office of Human Resources (OHR); Office of Information Resources Management (OIRM); Office of Legal Services (OLS); Office of Technical Support and Asset Management (OTSAM).

6.0 RESPONSIBILITIES

- 6.1 AIPT/SEB Contracting Officer – shall input the approved AIPT/SEB Planning Worksheet into the AIPT/SEB Resource Management System; comply with IP-470-01, EMCBC Visitor Access Procedure regarding visitor access; and carry out duties as described in this procedure.
- 6.2 AIPT Lead – shall complete the Preliminary and Final AIPT/SEB Planning Worksheets and carry out assigned duties as described in this procedure for the duration of the AIPT or until an SEB has been established and an SEB Chair has been designated.
- 6.3 EMCBC Senior Management – shall assign individuals to IPT/AIPT/SEBs as described in this procedure.
- 6.4 IPT Lead – shall complete the preliminary and final IPT Planning Worksheets and carry out assigned duties as described in this procedure for the duration of the IPT.
- 6.5 Assistant Director for the Office of Contracting – shall assign suites at the Chiquita and Springdale Facilities for use by AIPT/SEBs.
- 6.6 SEB Chair – shall revise the AIPT/SEB Planning Worksheet that was completed for the corresponding AIPT, and carry out duties as described in this procedure.
- 6.7 Office of Information Resource Management (OIRM) Representative – shall familiarize IPT/AIPT/SEB members with IRM procedures during the IPT/AIPT/SEB kick-off meetings; and ensure computer, email, and printer accessibility, as needed.
- 6.8 Office of Technical Support and Asset Management (OTSAM) Representative – shall familiarize IPT/AIPT/SEB members with safety procedures during the IPT/AIPT/SEB kick-off meetings, assign building and suite access codes, and issue office keys, as needed.

7.0 GENERAL INFORMATION – Not Applicable.

8.0 PROCEDURE FOR FORMATION, IDENTIFICATION AND MANAGEMENT OF AN AIPT/SEB

8.1 Requests for AIPT/SEB

8.1.1 Receipt of Requests - Typically, a request to form an AIPT/SEB comes from:

- a. The EM Deputy Assistant Secretary for Acquisition and Project Management (EM-50) to the EMCBC Director; or
- b. Project, technical, or other requirements personnel, e.g. Federal Project Director, Site Manager, EMCBC Assistant Director etc., to EMCBC Office of Contracting (OOC) personnel, e.g. OOC Assistant Director, OOC Division Chief, OOC Contracting Officer, etc.

- 8.1.2 Designation of an AIPT Lead/SEB Chair - All requests to form an AIPT/SEB shall be provided to the EMCBC Director and Deputy Director for appointment of an AIPT Lead/SEB Chair. NOTE: Source Selection Officials appointed by EM-50 are delegated the responsibility for assigning an SEB Chair for acquisitions under the purview of EM-50. In those cases, notification of SEB Chair assignment will come from the Source Selection Official.
- 8.2 Establishing an AIPT/SEB - The designated AIPT Lead/SEB Chair will be responsible for establishing the AIPT/SEB in accordance with the procedures described below.
- 8.3 Completing the Preliminary EMCBC AIPT/SEB Planning Worksheet - The AIPT Lead/SEB Chair shall complete the following preliminary items on the EMCBC AIPT/SEB Planning Worksheet (Attachment A; located on the EMCBC Intranet at K:/All Users/Forms):
- a. Description (Title) of acquisition
 - b. Estimated value
 - c. Expiration date of current contract
 - d. Anticipated Milestone Dates
 - e. Recommendations for AIPT members under the “Resources – Staffing” section, if available
- 8.4 Resource Assignment Process
- 8.4.1 The AIPT/SEB Chair will provide a copy of the preliminary AIPT/SEB Planning Worksheet to each EMCBC Senior Management member and request the assignment of EMCBC personnel to the AIPT. The AIPT Lead/SEB Chair should provide suggestions for assignment of personnel, where applicable.
- 8.4.2 The AIPT Lead/SEB Chair shall identify which specific assignments are being requested from each Senior Management Member to include the skills and abilities required for each assignment. For example, the Office of Contracting Assistance Director (AD) might be asked to recommend personnel for Contracting Officer, Contract Specialist, Cost/Price Analyst and CHRM Analyst; the Office of Legal Services AD might be asked to recommend personnel to serve as a Procurement Attorney; the Office of Cost Estimating and Project Management Support AD might be asked to recommend personnel to serve as Cost Estimator and Technical/Voting Member; and the Office of Technical Support and Asset Management AD might be asked to recommend personnel to serve as Technical/Voting Member and Subject Matter Expert.
- 8.4.3 There may be instances where required positions may overlap between two or more EMCBC Offices, e.g. Technical/Voting Member and Subject Matter Experts.

- 8.4.4 The EMCBC Senior Management Members shall consider the membership recommendations provided by the AIPT Lead/SEB Chair when deciding on an assignment.
- 8.4.5 The EMCBC Senior Management Members shall inform all members of their staff of each request for AIPT/SEB assignments and provide an opportunity for each of the staff to volunteer to fill a requested position.
- 8.4.6 When deciding on which of its staff, if any, to assign to an AIPT/SEB request, the EMCBC Senior Management Member shall consider the employee's skills, abilities, and experience; current and future workload; the time commitment required; whether the individual volunteered for assignment; and whether the individual has served on previous AIPT/SEBs.
- 8.4.7 The final decision on AIPT/SEB assignments within an office rest with that office's EMCBC Senior Management Member. A Senior Management Member can decline to provide a member of its staff for assignment to an IPT/SEB.
- 8.4.8 In instances where required positions may overlap between two or more EMCBC Offices, e.g. Technical/Voting Member and Subject Matter Experts, the AIPT Lead/SEB Chair shall meet with the EMCBC Senior Management Member from each affected office in order to discuss and reach resolution on assignments.
- 8.4.9 Each EMCBC Senior Management Member shall submit their completed worksheet to the AIPT/SEB Lead within 5 business days from the date of request.
- 8.5 The AIPT Lead/SEB Chair shall prepare a final AIPT SEB Planning Worksheet that identifies all final assignments under the "Resources-Staffing" section and updates and completes the remaining sections on the worksheet. Once completed, the AIPT Lead/SEB Chair shall submit the final AIPT/SEB Planning Worksheet to the EMCBC Director and Deputy Director for approval.
- 8.6 The final AIPT/SEB Planning Worksheet, once approved, shall be submitted to the AIPT/SEB Contracting Officer for input into the AIPT/SEB Resource Management System.
- 8.7 If needed, the AIPT Lead/SEB Chair shall request the assignment of an AIPT/SEB Suite in accordance with Section 8.8.
- 8.8 Suite Assignments and Logistics for AIPT/SEBs
 - 8.8.1 Suite Availability - EMCBC suites are available for use by AIPT/SEBs. They are located at 250 E. 5th Street, Cincinnati, OH (Chiquita Facility), and 110 Boggs Lane, Springdale, OH (Springdale Facility).

- 8.8.2 Requests for Suites - If the AIPT/SEB requires a suite to conduct its activities, the AIPT/SEB Lead shall submit a request to the EMCBC Office of Contracting Assistant Director.
- 8.8.3 Assignment of Suites - The EMCBC Office of Contracting Assistant Director is responsible for assigning suites to AIPT/SEBs.
- 8.8.4 Accountability - When the AIPT/SEB is not occupying its assigned suite, the Helpdesk must be notified by the AIPT Lead/SEB Chair for accountability purposes should an emergency arise.
- 8.8.5 Building/Suite Access Codes and Keys - Building/suite access codes and key assignments will be made by the OTSAM.
- 8.8.6 Orientation

The AIPT Lead/SEB Chair shall hold an orientation meeting with all AIPT/SEB members. During the Orientation Meeting, representatives from the EMCBC Office of Technical Support and Asset Management (OTSAM) and the EMCBC Office of Information Resources Management (OIRM) shall provide the AIPT/SEB members with safety and IRM procedures (as necessary), issue building/suite access codes and keys, and ensure all AIPT/SEB members are able to access computers, email accounts and printers. The AIPT/SEB Contracting Officer shall be available to meet with the AIPT Lead/SEB Chair prior to the orientation meeting to answer any questions regarding the information contained within this procedure.

8.8.7 Computer Access

8.8.7.1 In order to access the EMCBC network and set-up email and voicemail accounts, an EMCBC network account must be set up. EMCBC employed AIPT/SEB members are given network accounts and EMCBC email as part of their employment. The AIPT Lead/SEB Chair and Contracting Officer will determine whether or not non-EMCBC AIPT/SEB members need a network account based on the amount of time the AIPT/SEB member will be physically located in the suite, and the member's required access (if any) to the files and information on the EMCBC network.

8.8.7.2 The AIPT Lead/SEB Chair and Contracting Officer will also determine if non-EMCBC AIPT/SEB members will require EMCBC email access. This will be dependent upon the availability, features and convenience of access to the AIPT/SEB member's home office email system. Only federal agency email systems will be used for AIPT/SEB business. In no case will subcontractor, commercial or personal email accounts be used. In the event an AIPT/SEB member does not have access to a

compliant email account, an EMCBC network account and email address will be provided.

8.8.7.3 If an EMCBC network account is required, a User Agreement Access Form must be filled out by the AIPT/SEB member in accordance with IP-240-01, Cyber Security – Account Management and User Responsibilities, and submitted to the AIPT Lead/SEB Chair and Contracting Officer in advance of the member's arrival at the suite. The name of the AIPT/SEB to which the AIPT/SEB member is being assigned should be identified on the form. The completed form shall be submitted by the AIPT Lead/SEB Chair and Contracting Officer to OIRM. The AIPT Lead/SEB Chair and Contracting Officer is responsible for notifying the OIRM when network account access is no longer required.

8.8.7.4 Requests to set up restricted access folders on the AIPT/SEB-specific network drive must be made by the AIPT Lead/SEB Chair and Contracting Officer to OIRM via email. Access to the folder will be restricted to those individuals named in the request.

8.8.7.5 Laptops issued by commercial businesses or personal laptops shall not be connected to the EMCBC Network. The OIRM will attempt to allow access, via the Internet, to a Non-EMCBC AIPT/SEB member's remote services such as home office webmail, Citrix or remote conferencing within the confines of EMCBC security procedures and restrictions. However, under certain conditions, access to these EMCBC services may be diminished or completely restricted.

8.8.8 Information Resource Management (IRM) Support

Routine IRM support for computer users (e.g., lost documents, empty toner cartridges, printer problems, connectivity issues, etc.) can be requested by calling 513-246-0042 (Springdale) or 513-246-0600 (CBC Help Desk). All other IRM support should be requested via email by the AIPT Lead/SEB Chair and Contracting Officer. For example:

- Requesting a token for remote access
- Additional equipment needs
- Access to SEB folders

8.8.9 Check-Out

The AIPT Lead/SEB Chair and Contracting Officer are responsible for cleaning out the suite when the AIPT/SEB has completed its activities. The AIPT Lead/SEB Chair and Contracting Officer will contact OTSAM and a time/date will be scheduled for a joint walk-through/"checking-out" of the suite with the AIPT Lead/SEB Chair and Contracting Officer. At this time, all building/suite access codes will be re-set.

8.8.10 Chiquita Facility

8.8.10.1 Safety and Emergency Management

The AIPT Lead/SEB Chair (or designee) of each AIPT/SEB will assume the responsibilities of the Floor Warden per PL-472-01 (EMCBC Occupant Emergency Plan) for their assigned SEB suite. The AIPT Lead/SEB Chair will be responsible for the accountability of their AIPT/SEB and reporting personnel accountability to the Senior DOE Official or designee during an emergency situation and/or emergency drill. If a fire or evacuation alarm is activated, all DOE employees, contractor employees and visitors at the EMCBC should evacuate the building by the nearest exit (maps showing building exits are posted on each floor) and proceed outdoors to the primary building evacuation area located at the corner of Broadway and Fifth Streets. If emergency services are needed, employees are directed to call local 911. The employee who calls 911 or initiates an alarm should be prepared to assist management and/or first responders with a determination of facts. This includes what was observed and what, if any, response action was taken.

8.8.10.2 Building/SEB Suite Access

Employees currently working at the EMCBC already have key cards to gain access to the building. The AIPT Lead/SEB Chair is responsible for ensuring AIPT/SEB members have the correct access level to enter the SEB suites.

8.8.10.2.1 Non-EMCBC AIPT/SEB members must report to the front desk on the fifth floor to get a visitors' badge. The AIPT Lead/SEB Chair is responsible for providing the following information to the OTSAM for each of the AIPT/SEB members to obtain key cards:

- Name
- Duty Station (home office)
- Federal or contractor employee
- Duration of visit
- Citizenship

8.8.10.2.2 The AIPT Lead/SEB Chair and Contracting Officer is responsible for gathering all of the assigned key cards when no longer needed and returning them to OTSAM.

8.8.10.3 Equipment

8.8.10.3.1 Each suite is equipped with the following:

- Copier (with network printing and scanning capabilities)
- Presentation Projector

- Dedicated Computer (for use with the Presentation Projector)
- Conference Phone

8.8.10.3.2 Each Office is equipped with the following:

- Phone
- Computer (some with DVD Burner)

8.8.10.3.3 Copiers and shredders are located in Rooms 805, 818, and 850.

8.8.10.4 Supplies

For office supplies, contact the Office of Contracting Administrative Assistant at 513-246-0548.

8.8.10.5 Shredding

All source selection information documents that are determined to be non-records **MUST BE SHREDDED** (not thrown away or placed in recycle bins). Place any items to be shredded in the lockable shred bins located in Rooms 805, 810 and 850, or in the shred box located in the Suite on the 8th floor. These bins are emptied once a month and upon request. There are also shredders located in Rooms 805, 818, and 850.

Upon completion of the AIPT/SEB, all information determined to be non-records (e.g., excess copies of evaluation material, proposals [unless they are returned to the offeror]) must be shredded. The AIPT/SEB Contracting Officer is responsible for determining which documents are records and must be kept for the contract file and which documents are non-records and must be shredded in accordance with IP-243-03, Identifying, Filing and Maintaining Records. All non-record documents and electronic media (CDs, DVDs) must be removed from binders and separated before shredding (electronic media cannot be mixed with the paper shred). Large, lockable shred bins can be requested by contacting OTSAM at 513-246-1368. Once the bins are full, they will be picked up for shredding at an off-site location. A member of the AIPT/SEB must be present when the documents are picked up. To schedule a shred date, contact OTSAM at the number identified above.

8.8.10.6 Mail Service/UPS

The Mail Room is located on the 5th floor. Packages that need to be sent via UPS must be packed by a member of the AIPT/SEB. Contact the Office of Contracting Administrative Assistant for label preparation and further instructions.

8.8.10.7 Kitchen

A microwave, refrigerator, and vending machine are available for use in the break room on the 8th floor. Paper, plastic, aluminum, and glass recycle bins are located in the kitchen area.

8.8.10.8 Housekeeping

Trash cans must be placed outside the door (in the main hallway) each evening before AIPT/SEB members leave the suite. Empty cans should be taken back into the offices each morning.

8.8.10.9 Additional Information

There are maps, directions, forms, templates and procedures available for use on the EMCBC Common drive (K: Information for AIPTs, SEBs, Telecommuters).

8.8.11 Springdale Facility

8.8.11.1 Safety and Emergency Management

The AIPT Lead/SEB Chair (or designee) of each AIPT/SEB will assume the responsibilities of the Floor Warden per PL-472-01 (EMCBC Occupant Emergency Plan). The AIPT Lead/SEB Chair will be responsible for the accountability of their AIPT/SEB and reporting personnel accountability to the Senior DOE Official or designee during an emergency situation and/or emergency drill. If a fire or evacuation alarm is activated, all DOE employees, contractor employees and visitors at the Springdale facility should evacuate the building by the nearest exit (maps showing building exits are posted on each floor) and proceed outdoors to the primary building evacuation area located at the corner of Boggs Lane and McGillard Street (in the parking lot). If emergency services are needed, employees are directed to call local 911. The employee who calls 911 or initiates an alarm should be prepared to assist management and/or first responders with a determination of facts. This includes what was observed and what, if any, response action was taken.

8.8.11.2 Building/SEB Suite Access Codes and Keys:

Building access codes are assigned on an individual basis and must only be used by that specific individual. The AIPT Lead/SEB Chair and Contracting Officer will be given separate suite access codes for core members (members that will be in the suite on an ongoing basis) and for advisors/Subject Matter Experts (SME) (individuals that will provide temporary support). It is the responsibility of the AIPT Lead/SEB Chair and Contracting Officer to ensure each team member of the AIPT/SEB has the correct suite access code, as well as ensuring the suite access code be changed should there be a need, such as a change in core members of the AIPT/SEB, by notifying OTSAM at 513-246-1368.

8.8.11.2.1 Advisors and SMEs will be given a temporary code that will be re-set once they are no longer providing support. The AIPT Lead/SEB Chair and Contracting Officer **must** notify OTSAM when advisors/technical members and core members no longer need access to the suite so that codes can be re-set.

8.8.11.2.2 Separate access codes are required for entry into the building after normal business hours (before 6:00 AM and after 9:00 PM Monday-Saturday, and all day Sunday). The AIPT Lead/SEB Chair or CO must advise the SC of any AIPT/SEB members that require a building access code. The request will be forwarded to the OTSAM at the EMCBC.

8.8.11.2.3 The AIPT Lead/SEB Chair and CO will be assigned an office key by OTSAM to allow for further security within the assigned suite. Should there be a need for additional office keys, the AIPT Lead/SEB Chair and CO will be assigned these key(s) and be responsible for returning all of the key(s) when “checking-out” of the suite. Requests for keys should be kept to a minimum.

8.8.11.2.4 The AIPT Lead/SEB Chair and CO are responsible for ensuring AIPT/SEB members adhere to these requirements.

8.8.11.3 Equipment

8.8.11.3.1 Each SEB Suite is equipped with the following:

- Copier (with network printing and scanning capabilities)
- Color Printer
- Presentation Projector (for the conference room)
- Dedicated Computer (for use with the Presentation Projector)
- Conference Phone
- Fax Machine
- DVD Burner

8.8.11.3.2 Each Office is equipped with the following:

- Phone
- Computer

8.8.11.3.3 There is a heavy-duty shredder in the common area outside of SEB Suite 200.

8.8.11.3.4 SEB Suite 300 (the EMCBC Continuity of Operations [COOP] facility) has video-teleconference (VTC) capabilities and can be scheduled through the Helpdesk.

8.8.11.4 Supplies

Routine office supplies are available in the supply closet (Room 803). If needed items are not available, please contact the SC to request placement of an order.

8.8.11.5 Shredding

All source selection information documents that are determined to be non-records **MUST BE SHREDDED** (not thrown away or placed in recycle bins). Place any items to be shredded in the lockable shred bins located in each suite. These bins are emptied once a month. There is also a heavy-duty shredder located in the main hallway.

Upon completion of a project (e.g., at contract award), all information determined to be non-records (e.g., excess copies of evaluation material, proposals [unless they are returned to the offeror]) must be shredded. The Contracting Officer and Contract Specialist is responsible for determining which documents are records and must be kept for the contract file and which documents are non-records and must be shredded in accordance with IP-243-03, Identifying, Filing and Maintaining Records. All non-record documents and electronic media (CDs, DVDs) must be removed from binders and separated before shredding (electronic media cannot be mixed with the paper shred). Large, lockable shred bins can be requested by contacting OTSAM at 513-246-1368. Once the bins are full, they will be picked up for shredding at an off-site location. A member of the AIPT/SEB must be present when the documents are picked up.

8.8.11.6 Mail Service/UPS

There is no mail pick-up at the Boggs Lane building; however, there is a Post Office on Northland Boulevard. The EMCBC has a UPS account. Contact the Office of Contracting Administrative Support for package preparation and UPS drop-off locations. UPS boxes and envelopes are available in the storage closet (Room 803). (A Map to the Post Office is located on the SEB-specific network drive under Information for IPTs, SEBs, Telecommuters\Maps & Directions.)

8.8.11.7 Kitchen:

A microwave, toaster oven and refrigerator are available for use in the break room (Room 801). Vending machines are located on the 3rd floor of the Boggs Lane building. Paper, plastic, aluminum, and glass recycle bins are located in the kitchen area.

8.8.11.8 Housekeeping:

Vacuuming/dusting of the suites is performed on the last Thursday of the month. The cleaning staff does not have access to the suites so an AIPT/SEB member must be present to let cleaning staff in. There is a vacuum cleaner in the storage closet (Room 803) for use as necessary. Trash cans must be placed outside the door (in the main hallway) each evening before AIPT/SEB members leave the suite. Empty cans should be taken back into the offices each morning.

8.8.11.9 Additional Information:

There are maps, directions, forms, templates and procedures available for use on the AIPT/SEB-specific network drive under Information for IPTs, SEBs, Telecommuters.

9.0 PROCEDURE FOR FORMATION, IDENTIFICATION AND MANAGEMENT OF AN IPT

- 9.1 Requests for IPT - an IPT is a cross-functional group of EMCBC employees organized for the specific purpose of delivering a project or product to an external or internal customer, e.g. conducting an EMCBC Customer Survey; organizing an EMCBC-wide function such as a Holiday Party; or creating a new EMCBC-wide policy or process. All requests to form an IPT shall be provided to the EMCBC Director and Deputy Director for appointment of an IPT Lead.
- 9.2 Establishing an IPT - The designated IPT Lead will be responsible for establishing the IPT in accordance with the procedures described below.
- 9.3 Completing the Preliminary EMCBC IPT Planning Worksheet - The IPT Lead shall complete the following preliminary items on the EMCBC IPT Planning Worksheet (Attachment B; located on the EMCBC Intranet at K:/All Users/Forms):
 - a. Description (Title)
 - b. Anticipated Deliverable or Product
 - c. Anticipated Milestone dates
 - d. Recommendations for IPT members under the “Resources – Staffing” section, if available.
- 9.4 Resource Assignment Process
 - 9.4.1 The IPT/SEB Chair will provide a copy of the preliminary IPT Planning Worksheet to each EMCBC Senior Management member and request the assignment of EMCBC personnel to the IPT. The IPT Lead may provide suggestions for assignment of personnel.
 - 9.4.2 The IPT Lead shall identify which specific assignments are being requested from each Senior Management Member to include the skills and abilities required for each assignment.

- 9.4.3 The EMCBC Senior Management Members shall consider the membership recommendations provided by the IPT Lead when deciding on an assignment.
- 9.4.4 The EMCBC Senior Management Members shall inform all members of their staff of each request for IPT assignments and provide an opportunity for each of the staff to volunteer to fill a requested position.
- 9.4.5 When deciding on which of its staff, if any, to assign to an IPT request, the EMCBC Senior Management Member shall consider the employee's skills, abilities, and experience; current and future workload; the time commitment required; whether the individual volunteered for assignment; and whether the individual has served on previous IPT.
- 9.4.6 The final decision on IPT assignments within an office rest with that office's EMCBC Senior Management Member. A Senior Management Member can decline to provide a member of its staff for assignment to an IPT/SEB.
- 9.4.7 In instances where required positions may overlap between two or more EMCBC Offices, the IPT Lead shall meet with the EMCBC Senior Management Member from each affected office in order to discuss and reach resolution on assignments.
- 9.4.8 Each EMCBC Senior Management Member shall submit their completed worksheet to the IPT Lead within 5 working days from the date of request. If the EMCBC Senior Management Member is not providing any resources, they shall still submit the worksheet and notate it as such.
- 9.5 Final IPT Planning Worksheet - The IPT Lead Chair shall prepare a final IPT Planning Worksheet that identifies all final assignments under the "Resources-Staffing" section and updates and completes the remaining sections on the worksheet. Once completed, the IPT Lead shall submit the final IPT Planning Worksheet to the EMCBC Director and Deputy Director for approval.
- 9.6 Reporting - The IPT lead will be responsible for reporting directly to the EMCBC Deputy Director on status of IPT milestones. Status updates may be established prior to each milestone or on as needed basis depending on the nature of the IPT.

10.0 RECORDS MAINTENANCE

- 10.1 Records generated as a result of implementing this document are identified as follows and are managed in accordance to the respective Organization File Plan:
 - 10.1.1 ADM 03-03-A1A – Contract Files – Transactions above the Simplified Acquisition Threshold – Maintained by the Office of Contracting
 - 10.1.2 ADM 03-03-A1B – Contract Files – Transactions below the Simplified Acquisition Threshold – Maintained by the Office of Contracting

10.1.3 ADM 20-01-C – Computer System Usage Information – Maintained by the Office of Information Management

10.1.4 IPT Project Files will be assigned an Organizational File Code based on the function/subject of the project. – Maintained by the office of the IPT Lead

11.0 FORMS USED

11.1 All forms used are the latest revision unless otherwise specified.

11.1.1 IP-540-11-F1, “EMCBC AIPT/SEB Planning Worksheet”

11.1.2 IP-540-11-F2, Rev. 0 “EMCBC IPT Planning Worksheet”

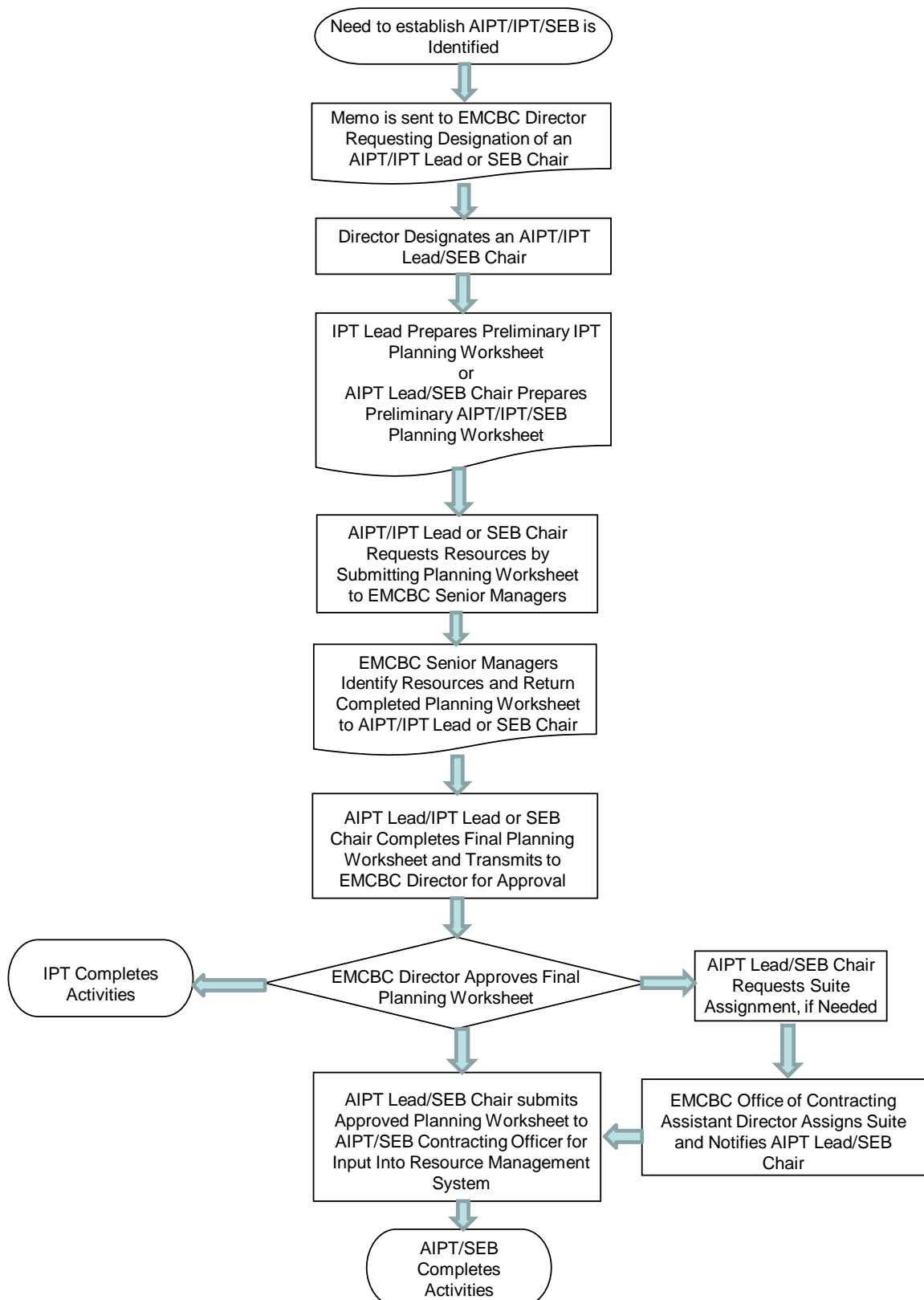
11.1.3 IP-240-01-F1, “Rules of Behavior for EMCBC Information Systems”

11.1.4 IP-240-01-F2, “User Acknowledgement Agreement for Two-Factor Authentication and Remote Access Connection Services”

12.0 ATTACHMENTS

12.1 Attachment A – IP-540-11-F1, EMCBC AIPT/SEB Planning Worksheet

12.2 Attachment B – IP-540-11-F2, Rev. 0 EMCBC IPT Planning Worksheet

13.0 FLOWCHART

Attachment A

EMCBC AIPT/SEB PLANNING WORKSHEET

| Background | | | |
|---|----|----------------------------|----|
| Description (Title) | | Date Initiated | |
| Estimated Value | \$ | Date New Contract Required | |
| Milestones | | | |
| Requirements Definition | | Contract Awarded | |
| Acquisition Plan | | Transition to New Contract | |
| Request for Proposals | | Discussions | |
| Industry Proposal Development | | Final Evaluation | |
| Initial Evaluation | | Award Contract | |
| Award Contract (without Discussions) | | Transition to New Contract | |
| Resources - Staffing | | | |
| AIPT Lead | | SEB Chairperson | |
| AIPT Project/Technical Member | | SEB Voting Member | |
| AIPT Project/Technical Member | | SEB Voting Member | |
| AIPT Project/Technical Member | | SEB Voting Member | |
| Contracting Officer | | Other | |
| Contract Specialist | | Other | |
| Cost/Price Analyst | | Other | |
| Procurement Attorney | | Other | |
| Cost Estimator | | Other | |
| Resources - Budget | | | |
| CBC Travel | \$ | <i>Funding Source</i> | |
| Non-CBC Travel | \$ | CBC | \$ |
| Support Services | \$ | HQ | \$ |
| Other Costs | \$ | Project | \$ |
| Total Costs | \$ | Total Funding | \$ |
| Resources – Facilities and Equipment | | | |
| Suite Location | | Number of Computers | |
| Occupancy Dates | | Number of Phones | |
| | | Number of Projectors | |
| | | Other | |
| | | Need By Date: | |

EMCBC AIPT/SEB PLANNING WORKSHEET

| Approvals | | |
|---|---------------------------------|------|
| Prepared by | | |
| | Name/Signature | Date |
| | | |
| | Title/Contact Info | |
| Approval | | |
| | EMCBC Deputy Director Signature | Date |
| | | |
| | EMCBC Director Signature | Date |
| Entered Into AIPT/SEB Resource Management System | | |
| | Name/Signature | Date |

IP-540-11-F1
(Page 2 of 2)

EMCBC IPT PLANNING WORKSHEET

| | | | |
|---|--|------------------------------|-------------|
| Background | | | |
| Description (Title) | | Date Initiated | |
| Anticipated Deliverable or Product | | | |
| Milestones | | | |
| Example: IPT Established | May 1, 2012 | | |
| | | | |
| | | | |
| | | | |
| Resources - Staffing | | | |
| IPT Lead | | Member | |
| Member | | Member | |
| Member | | Member | |
| Resources - Budget | | | |
| CBC Travel | \$ | <i>Funding Source</i> | |
| Non-CBC Travel | \$ | CBC | \$ |
| Support Services | \$ | HQ | \$ |
| Other Costs | \$ | Project | \$ |
| Total Costs | \$ | Total Funding | \$ |
| Approvals | | | |
| Prepared by | | | |
| | Name/Signature | | Date |
| | | | |
| | Title/Contact Info | | |
| Approval | | | |
| | EMCBC Deputy Director Signature | | Date |
| | | | |
| | EMCBC Director Signature | | Date |

EMCBC RECORD OF REVISION

DOCUMENT : Identification and Management of an Integrated Project Team (IPT)/Acquisition Integrated Project Team (AIPT)/Source Evaluation Board (SEB) at the EMCBC. (IP-540-11 Rev. 2)

If there are changes to the controlled document, the revision number increases by one. Indicate changes by one of the following:

- 1 Placing a vertical black line in the margin adjacent to sentence or paragraph that was revised.
- 1 Placing the words GENERAL REVISION at the beginning of the text.

| Rev. No. | Description of Changes | Revision on Pages | Date |
|-----------------|---|--------------------------|-------------|
| 1 | Original Issue | All | 05/17/11 |
| 2 | GENERAL REVISION to include Distinguishing between acquisition related and non-acquisition related IPTs/SEBs; and to add a process for assigning resources to AIPT/IPT/SEBs | All | 06/29/12 |